CPPS USER MANUAL AND GLOSSARY POSITION CONTROL

Colorado Department of Personnel & Administration

Division of Human Resources	Central Payroll	Technology Management Unit
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POSITION CONTROL ACTIONS

Position Control is the functional area of the system to add, change, or inquire on position database records. The main menu has a workflow transaction for creating new positions as well as update and inquiry transactions to access basic information, skills information or budget information for a position. To use any of the transactions, enter the new Position Number and Organization on the Position Control Menu and select the desired transaction.

Position Numbers in the system are made up of the three letter Agency code followed by the position's identifying number within the Agency. This structure is essential for associating employees with positions because the Job Department, Position Number, and Organization on the employee Job Assignment will be used to locate the position in the Position Control system.

Basic position control activities include:
  Abolishing or Reactivating a Position
  Budget Update
  Creating a New Position
  Data Correction
  Incumbent Update (Status Change)
  Position Evaluation and Reclassification
  Other Data Changes
  System Maintenance

Abolishing and Reactivating Positions
The 04 - Abolish Position and 07 - Reactivate Position are primarily actions that change the status of a position. These actions make a position available or unavailable for use. To abolish a position is to remove a vacant position from the set of active positions. To reactivate a position is to restore an abolished position as a vacant active position. Often this is done to recycle the position number and set up an essentially new position to accommodate the needs of the business. The position's basic information fields can be set with this action to whatever is needed for the position.

From the Position Control Menu select Basic Position Update. Enter the Effective Date. Select the appropriate action, Action 04 -Abolish Position or 07 - Reactivate Position, and set the Position Status and Position Status Date. For a Reactivation, set any of the other fields as appropriate for the position.

Budget Adjustment
The 05 - Budget Adjustment action is primarily used to update data on the Position Budget Information screen, but it may also be used to update the Allotted FTE % or Funded fields on the Basic Position Information screen.

Select the update transaction, Position Budget Update, or Basic Position Update, according to what needs to be changed.

Change Employment Conditions

The action 03 – Change Employment Conditions is the general action to update position characteristics related to employment conditions such as Full-time/Part-time, Shift, or Premium Pay Eligibility. This action is used to update such fields for changes that didn't originate from reclassification or System Maintenance. It would include changes to the requirements for the position such as adding special qualifications to the description or skills information.

Select an update transaction Basic Position Update or Position Skills Update according to what needs to be changed. Set the Effective Date as needed, and select action 03 – Change Employment Conditions. Update the fields as needed.

Data Correction

The 10 - Data Correction action is used to correct data that was incorrectly entered on a position. Most position data elements can be changed with this action. Use this action only for corrections, not for updates that occur with the normal course of business. Corrections to Budget Adjustments should be fixed with additional budget adjustment entries.

Select the update transaction, Basic Position Update, Position Skills Update, or Position Budget Update according to what needs to be corrected.

Miscellaneous Change

Basic position data or position skills updates that don't directly change employment conditions or special qualifications should be done with action 09 - Miscellaneous Change. Typically this covers minor changes to basic position information or the description, such as the working title or the agency user fields. Changes to the description and skills that aren't special qualifications can be made with this action as can minor changes to the budget data, like adding the approval date.

Select the update transaction Basic Position Update, Position Skills Update, or Position Budget Update according to what needs to be changed.

Other Data Change

The action 09 – Other Data Change is the general action to update basic position characteristics or description. This action is used to update such fields for changes that didn't originate from reclassification or System Maintenance. It would include changes to the requirements for the position such as adding special qualifications to the description or skills information.

Select an update transaction Basic Position Update or Position Skills Update according to what needs to be changed. Set the Effective Date as needed, and select action 09 – Other Data Change. Update the fields as needed.

Position Evaluation

The 08 - Position Evaluation and 02 - Reclassify Position are actions related to the job class on an active position. The 08 - Position Evaluation action is to record the result and the date of the most recent class evaluation done on the position.

From the Position Control Menu select Basic Position Update. Enter the Effective Date. Select Action 08 - Position Evaluation and set the Evaluation Result and Last Evaluation Date. Select Enter to check for errors. If errors are found, correct them and try again. If not, select Enter again to complete the transaction and return to the menu.

The valid values for the Evaluation Result field are:
> SC – Sustain Classification
> RR – Reclassification Recommended

If the result of the evaluation is that the position should be reclassified, then the separate reclassification action would follow this action.

Reclassify Position

If an active position is to have the Job Class changed, Action 02 – Reclassify Position is used.

From the Position Control Menu select Basic Position Update. Enter the Effective Date. Select Action 02 – Reclassify Position and set the Job Class to the new value. Select Enter to check for errors. If errors are found, correct them and try again. If not, select Enter again to complete the transaction and return to the menu.

The same action code could be used to update the position description or budget as needed. For example, if the position description should be changed with the reclassification then the 003 Transaction could be selected, then the same action code, 02, with the same effective date could be entered with the changes to the position description on the position skills information screen.

If the position is filled, then the employee's records will also need to be updated with the appropriate personnel action as defined for the HR system. Choose the Personnel Update menu and proceed with the menu transaction and personnel action as needed. For Classified it may be a Promotion with an Action Subtype of Reallocation. For Judicial the personnel action may be Reclassification.

When vacant positions are reclassified they may also have a number of other field values changed with the same action to set up the position to meet the needs of the business.

System Maintenance

The 30 - System Maintenance action is used to update data on a position based on a system maintenance study. Typically a process run by the Department of Personnel and Administration will do this, but it may be applied individually to update a record that was missed due to a problem. Select the Basic Position Update transaction and update the record. There may need to be an update applied to the incumbent employee's records as well.
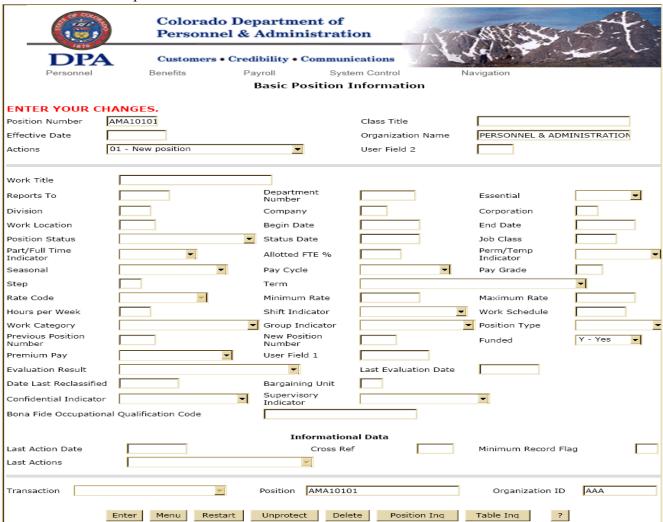
Creating a New Position

This action is used to create a record for a new position number in the system regardless of the type of position. This is the only action where workflow is used.

Enter the new Position Number and Organization on the Position Control Menu and select the Initial Position Profile Update transaction.

Position Numbers are made up of the three letter Agency code followed by the position's identifying number in the Agency. This structure is essential for associating employees with positions because the Job Department, Position Number, and Organization on the employee Job Assignment will be used to locate the position in the Position Control system.

The Initial Position Profile transaction from the menu will chain through all three screens of position data. It can only be used for a new position number. The first screen displayed is the Basic Position Information. This screen contains almost all the fields that describe the general characteristics of the position.

Correct the Effective Date if needed and select Action 01 - New Position. Fill out the rest of the data as appropriate for the position. Select Enter. If there are no errors the following message is displayed:

REVIEW DATA.   ENTER TO PROCEED.   COMPLETE NEXT TRANSACTION
REQUEST.
Select Enter again to complete the screen and advance to the next screen.

Required Fields
       Effective Date: date the Position Action is effective.
       Action: select value 01 - New Position
       Department: three letter department code plus locator code. Must be in the Department
       table.
       Begin Date: date the position is established or reestablished.
       End Date: date the position is discontinued.
       Position Status, the valid values for a new position should be:
            V – Vacant Active Position
       Position Status Date: date when Position Status change is effective.
       Job Class: code for the job class for the position. Must be a valid active class on the job
            class table.
       Part/Full Time Indicator, valid values are:
            F - Full time
            P - Part time
       Allotted FTE %: budget FTE for the position expressed as a percentage.
       Perm/Temp Indicator, valid values are:
            P - Permanent
            T - Temporary
            S - Substitute
            E - Emergency
       Position Type: indicates eligibility for overtime. Valid values are:
            E - Exempt
            N - Non-exempt
       Funded: indicates whether the position is funded. Value values are:
            Y - Yes
            N - No

Other Fields
       User Field 2: for agency use. May be used for agency specific reference number.
       Work Title: working title of the position.
       Reports To: position number of the person who supervises the position.
       Essential, valid values are:
            Y - Yes
            N - No
       Division: for agency use for hierarchical level 3.
       Company: for agency use for hierarchical level 2.
       Corporation: for agency use for hierarchical level 1.
       Work Location: code for geographical location of work for the position.
       Seasonal, valid values are:
            N - Not Seasonal
            Y - Seasonal, UI
            S - Seasonal, no UI
       Pay Cycle: the normal Payroll Cycle in which the position is included. Valid values are:
            B1 - Biweekly 1

M1 - Monthly 1

M2 - Monthly 2

Pay Grade: the grade for the job class, must match the job class table.

Term: position descriptor originally used to distinguish characteristics such as HR system, part/full time, perm/temp, etc. Primarily used to report employees credited with 12 months of service in a year, but paid over 9 or 10.

Hours per Week: normal number of hours per week for the position.

Shift: normal shift for the position. Valid values are:

D - Day

N - Night

G - Graveyard

1 - First

2 - Second

3 - Third

4 - Other

Schedule: normal weekly scheduled workdays for the position. Positions 1 through 7 correspond to Monday through Sunday. A letter .X. entered in any of these positions indicates a day off. For example, the code 0XXXXX0 indicates a Tuesday through Saturday workweek.

Work Category: general classification of work similar to EEO reporting.

Group Indicator: Indicates whether the position is 'grouped' or not. A grouped position is a single position filled by multiple incumbents such as several part-time employees.

Previous Position Number: Indicates the previous position number if the position evolved from another position due to changes in position responsibilities or other characteristics. Previous Position Number provides a historical reference to the other position.

New Position Number: Indicates the super seceding position number if the position evolved to another position due to changes in position responsibilities or other characteristics. New Position Number provides a historical reference to the other position.

Premium Pay: indicates eligibility for premium pay. Valid values are:

0 - No premium pay

1 - Shift

2 - On-call

3 - Shift and On-call

9 - SES

User Field 1: for agency use. May be used for hierarchical or geographic indicators for the position.

Evaluation Result: outcome of the most recent position evaluation. Valid values are:

SC - Sustain Classification

RR - Reclassification Recommended

Last Evaluation Date: date of the most recent position evaluation.

Date Last Reclassified: date the position was last reclassified.

Bargaining Unit:

Confidential Indicator: indicates if the position is a Judicial 'Confidential' position.

Supervisory Indicator: indicates if the position is supervisory.

Bona Fide Occupational Qualification: indicates a deliberate employment discrimination requirement related to ethnicity, sex, age, religion, or disabled status.

In the workflow the next screen to be displayed for update is the Position Skills Information screen. There should also be this message:

ENTER YOUR CHANGES. UPDATE FROM PRIOR SCREEN SUCCESSFUL.

The Effective Date and Action will carry over from the previous screen. Fill out the position description and other skills data as appropriate for the position. Select Enter. If there are no errors the following message is displayed:

REVIEW DATA.   ENTER TO PROCEED.   COMPLETE NEXT TRANSACTION REQUEST.

Select Enter again to complete the screen and advance to the next screen.

Required Fields

    Effective Date: date the Position Action is effective.

    Action: select value 01 - New Position

Other Fields

    User Field 2: for agency use. May be used for agency specific reference number.

    Position Description: Indicates requirements for the position more specific than the class description.

    Skill Types: Identifies specific skills for the position, (e.g., shorthand). There is no specific value set, but examples could be design, math, or writing.

    Education Level: Indicates the level of formal education required for the position. Valid values are:

    blank-Not Indicated

    0-Less than high school

    1-High school diploma or equivalent

    2-Vocational or Trade school

    3-Associate degree

    4-Bachelor's degree

    5-Master's degree

    6-Advanced Certification, special degree

    7-Professional degree

    8-Doctorate

    License/Certificate: Indicates up to two licenses or certificates required for the position.

    Months of Experience: Indicates the number of months of applicable experience required for the position.

In the workflow the next screen to be displayed for update is the Position Budget Information screen. There should also be this message:
ENTER YOUR CHANGES. UPDATE FROM PRIOR SCREEN SUCCESSFUL.

The Effective Date and Action will carry over from the previous screen. Fill out the position

budget data as appropriate for the position. Select Enter. If there are no errors the following

message is displayed:

REVIEW DATA.   ENTER TO PROCEED.   COMPLETE NEXT TRANSACTION REQUEST.

Select Enter again to complete the screen and transaction and return to the menu.

Required Fields

Effective Date: date the Position Action is effective.
Action: select value 01 - New Position

Other Fields

User Field 2: for agency use. May be used for agency specific reference number.

Approval Date: Indicates the date the budget for this position was approved. This date is used for historical information.

Budget Type: Indicates if the funding for the position is permanent or temporary. Temporary budgets are not projected into the next budget year. Valid values are:

P - Permanent
T - Temporary

Current Budget Year: Indicates the calendar year in which the respective budget period

ended or ends (Fiscal Year). The year must be a valid prior, current, or next year

as indicated by entries in the System Parameters Table on the Control File. For

this field, the system allows prior, current and next year information.

Current Year Budget: This field is not used at this time.

Current Year Budget Adjustment: Represents the Budget Adjustment amount. This can be either a beginning budget amount for a newly established position or an adjustment to an existing budget.

Current Year Adjustment Code: Indicates if the Budget Adjustment amount is added to or subtracted from the Beginning Budget or if the new adjustment amount replaces any previous value from the Budget Adjustment field. The adjustment code is actually part of the Budget Adjustment data element rather than a separate data element. However, it is shown separately on the form and the screen for easy identification. Valid values are:

+ for Positive adjustment
- for Negative adjustment
+R for Positive replacement
-R for Negative replacement blank Positive adjustment

Current Year Adjustment Reference: Indicates the most recent adjustment transaction. This is an informational item used to provide an audit trail for budget adjustments.
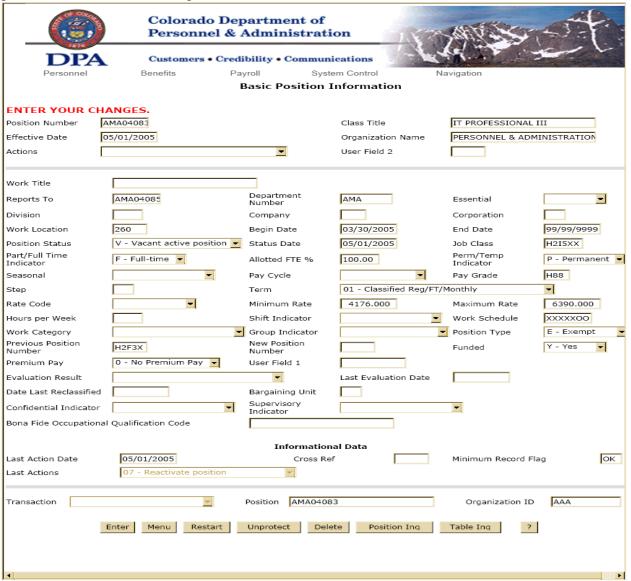
Current Year FTE: Indicates the Full-Time Equivalent (FTE) count for the position. For example, a position defined to have one incumbent working full-time has an FTE of 1.00. A grouped position having five half-time incumbents has an FTE of 2.50. The FTE count should be the number of FTEs budgeted for the entire position.

Incumbent Update

This action is used to manually update the position status to reflect when an employee fills or vacates the position. The action is to set the Position Status from 'Vacant active position' to 'Filled active position' or vice versa.

This action should follow any employee action that moves an employee in or out of the position. For 'Grouped' or pooled positions, this action is used after the first employee fills the position or the last employee vacates. This is how positions are synchronized with employees.

From the Position Control Menu select Basic Position Update. This displays the Basic Position Information screen for updating. This screen contains almost all the fields that describe the general characteristics of the position.

Correct the Effective Date if needed. Select Action 12 - Incumbent Update Status Change. Select the new Position Status value and set the new Position Status Date. When done select the Enter button. If there are no errors the following message is displayed:

REVIEW DATA.   ENTER TO PROCEED.   COMPLETE NEXT TRANSACTION REQUEST.

Select Enter again to complete the transaction.

Required Fields
Effective Date: date the Position Action is effective.

Action, select 12, Incumbent Update Status Change.

Position Status, valid values for an incumbent status change are:
    F – Filled Active Position
    V – Vacant Active Position

Position Status Date: date when the Position Status change is effective.

Other Fields

    User Field 2: for agency use. May be used for agency specific reference number.

Reclassify Position

If an active position is to have the Job Class changed, Action 02 – Reclassify Position is used.

From the Position Control Menu select Basic Position Update. Enter the Effective Date. Select Action 02 – Reclassify Position and set the Job Class to the new value. Select Enter to check for errors. If errors are found correct, them and try again. If not, select Enter again to complete the transaction and return to the menu.

The same action code could be used to update the position description or budget as needed. For example, if the position description should be changed with the reclassification then the 003 Transaction could be selected, then the same action code, 02, with the same effective date could be entered with the changes to the position description on the position skills information screen.

If the position is filled, then the employee's records will also need to be updated with the appropriate personnel action as defined for the HR system. Choose the Personnel Update menu and proceed with the menu transaction and personnel action as needed. For Classified it may be a Promotion with an Action Subtype of Reallocation. For Judicial the personnel action may be Reclassification.

When vacant positions are reclassified they may also have a number of other field values changed with the same action to set up the position to meet the needs of the business.

Personnel	Benefits	Payroll	System	Navigation	Reporting

Basic Position Information

ENTER YOUR CHANGES.

Position Number	AQB09029	Class Title	TECHNICIAN IV
Effective Date	12012005	Organization Name	PERSONNEL & ADMINISTRATION-
Actions	02 - Reclassify position	User Field 2	18888

Work Title

Reports To   AQB09009   Department Number   AQB   Essential

Division   Company   Corporation

Work Location   Active Start Date   07/01/1997   End Date   99/99/9999

Position Status   F - Filled act pos   Status Date   03/14/2005   Job Class   H4M4XX

Part/Full Time Indicator   F - Full-time   Allotted FTE %   100.00   Perm/Temp Indicator   P - Permanent

Seasonal   N - Not Seasonal   Pay Cycle   Pay Grade   H33

Term   01 - Classified Reg/FT/Monthly

Rate Code   Minimum Rate   2999.000   Maximum Rate   4589.000

Hours per Week   Shift Indicator   Work Schedule

Work Category   Group Indicator   Position Type   N - Nonexempt

Previous Position Number   New Position Number   Funded   Y - Yes

Premium Pay   1 - Shift   User Field 1   100AQB4010

Evaluation Result   RR - Reclassification recommended   Last Evaluation Date   12012005

Date Last Reclassified   12012005

Confidential Indicator   Supervisory Indicator

Bona Fide Occupational Qualification Code

Transaction   Position   AQB09029   Organization ID   AAA

Enter	Menu	Restart	Unprotect	Position Inq	Table Inq	?